



The UK and European Electric Vehicle Industry

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EV background:

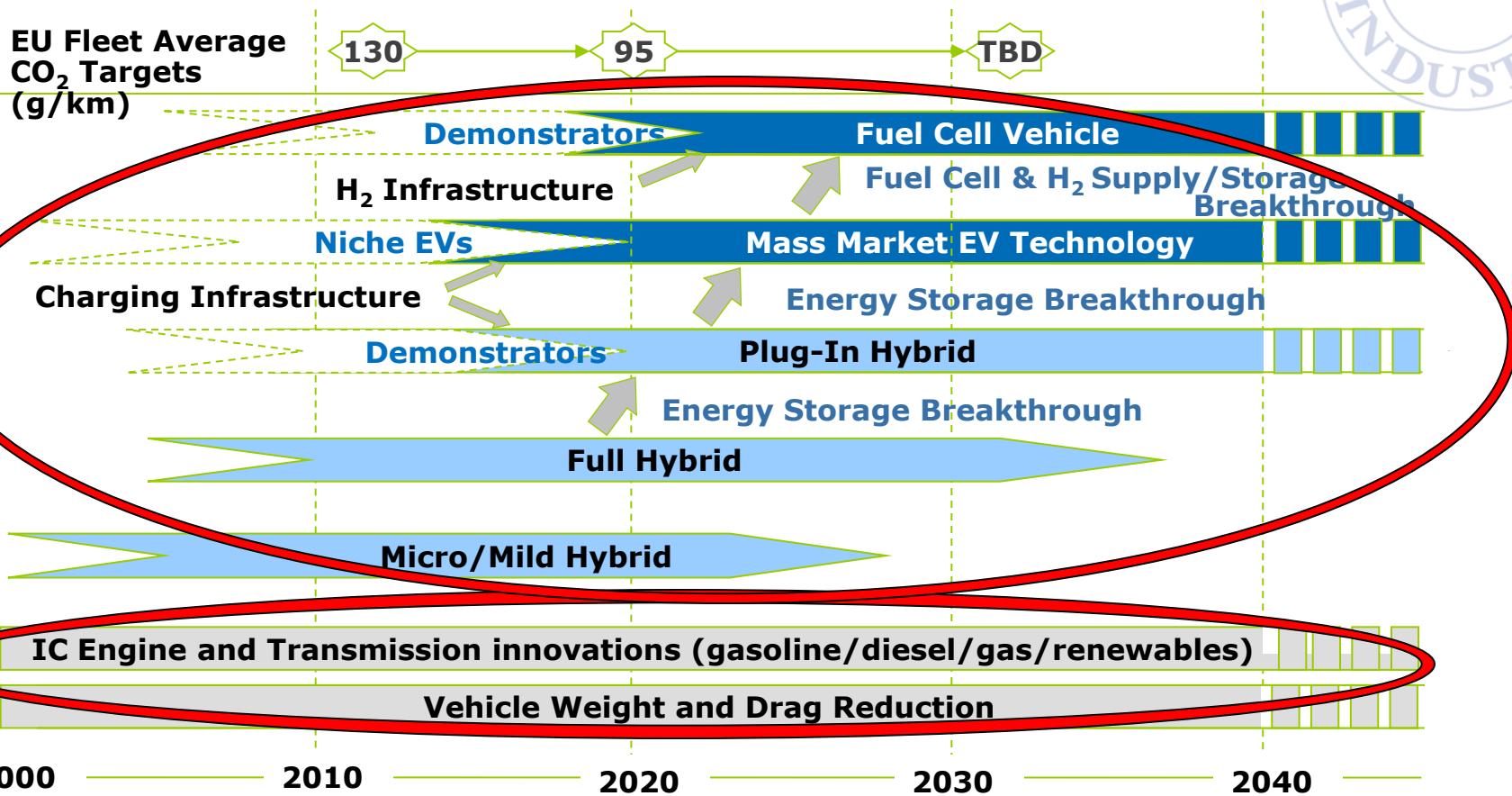




Contents:

- Context: Technology roadmap
- Electric vehicles in the UK
- European perspective
- An example of SMMT action

Context:



- Longevity of the Internal Combustion Engine
- A portfolio of technologies is emerging



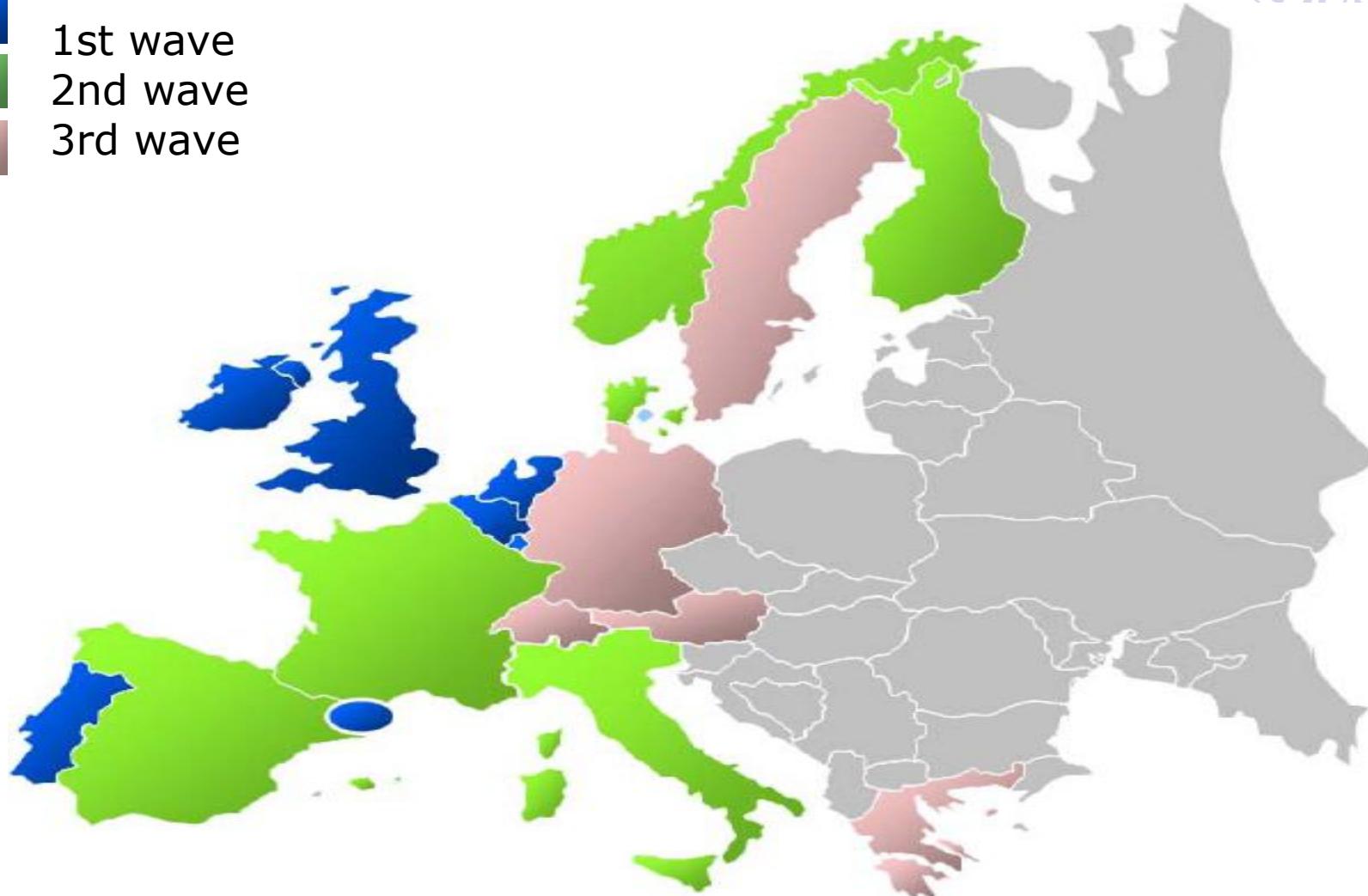
Electric vehicles in the UK:

- The industry
- The government
- The market
- The secret ingredient



Nissan's view:

- █ 1st wave
- █ 2nd wave
- █ 3rd wave





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UK Government support:

- National
- Regional



Office for Low
Emission Vehicles





UK Government support:

R&D support

- £ 120 million + Technology Strategy Board Low Carbon Vehicles
- Skills and trainings programmes

Manufacturing support

- £ 19 million supply chain competition
- Emphasis on SMEs and sourcing in the UK

Recharging infrastructure

- £ 30 million for 'Plugged-in Places'
- £ 0.5 million for 72 electric charging points and four gas refuelling stations in seven areas across England



UK Government support:

Promotion of technology

- £ 43 million consumer incentives
- £ 30 million Green Bus Fund
- £ 25 million ultra low carbon vehicle demo-programme
- £ 24 million in high value manufacturing R&D

• Further measures

- Vehicle Excise Duty exemption
- 1st year capital allowances for fleet vehicles and vans
- 0% Benefit in Kind/ company car tax for 5 years
- Lower rate of VAT for domestic electricity



UK Government support:

- National
- Regional
 - 25,000 charge points
 - 100,000 vehicles (1,000 vehicles in GLA fleet)
 - Congestion Charge exemption in London
 - Free/reduced price, e.g. City of Westminster
 - Pan-London brand/ website



UK Government support:



- OLEV
- Low Carbon Vehicle Partnership
- Technology Strategy Board
- Energy Technologies Institute
- Cenex
- London Electric Vehicle Partnership
- Local enterprise partnerships
- UK Trade & Investment



- ❖ SMMT: close relationship with government



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Market perception of EVs:

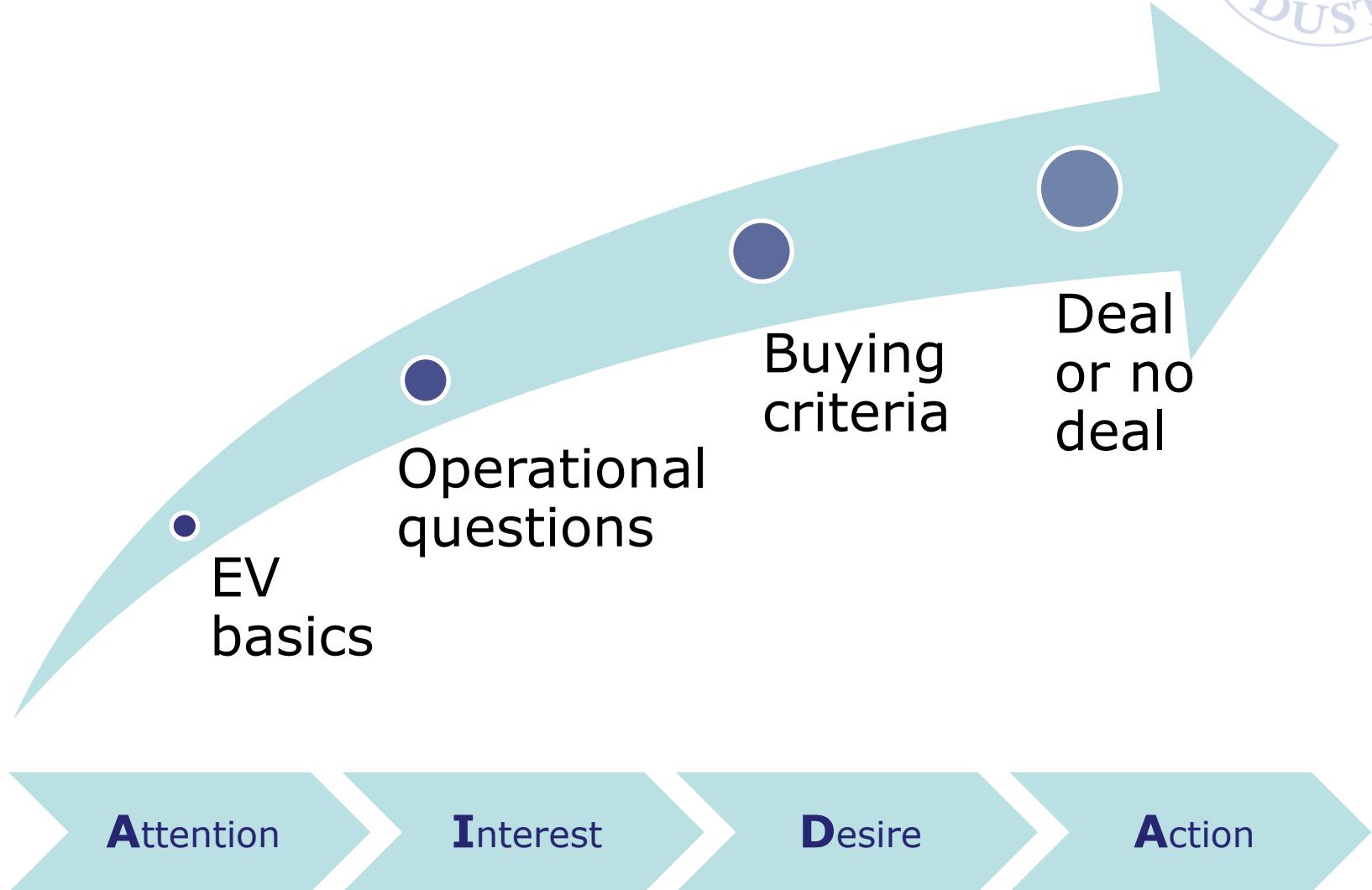


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Market perception of EVs:



The learning curve:



Key tactic: Experiential Marketing



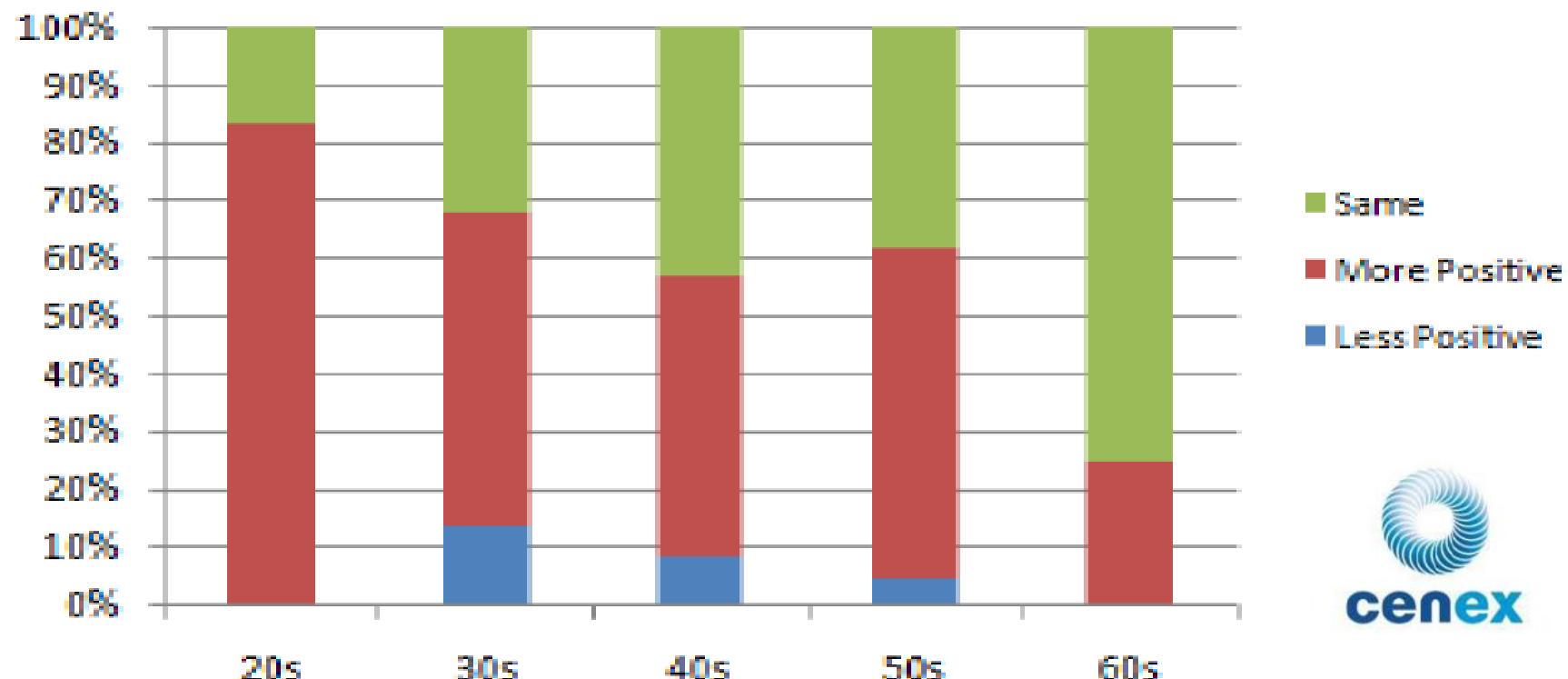
- Speed up the learning curve
- Change perception: Win hearts and minds
- Bums on seats = vehicles sold

Perception change:

Perception change:



Users attitude towards electric vehicles after trial, by age group



Working together to enable
the EV market:



Can we share any
ideas or work
together to speed up
perception and
behavioural change?

Repositioning and myth
busting required!

Focus on emotional
aspects

Electric vehicles in the UK:



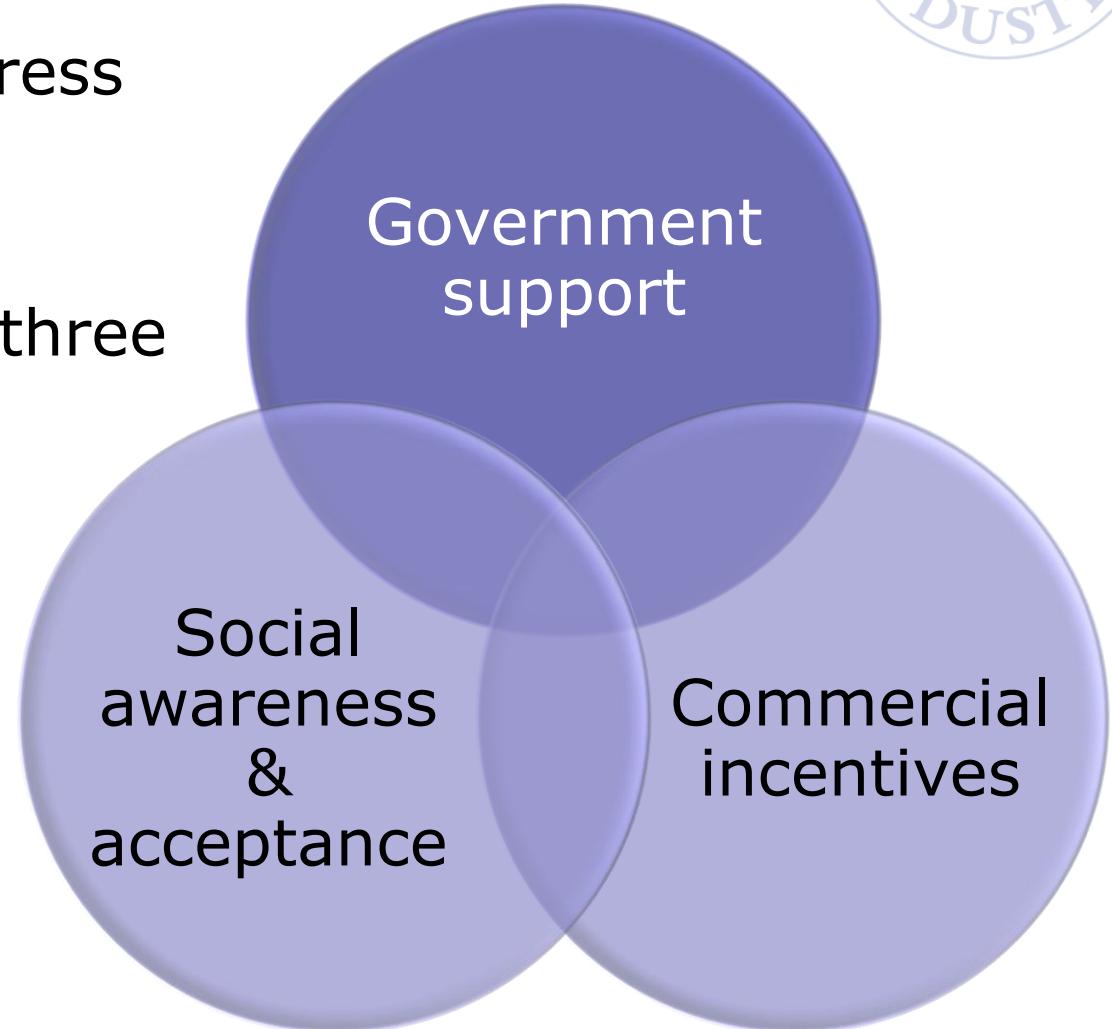
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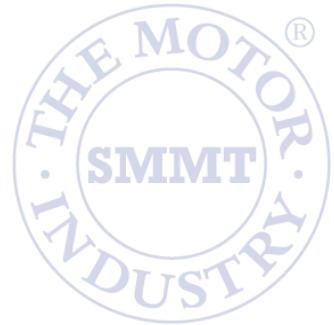


Electric vehicles in the UK:

- ✓ Significant progress since 2006
- ✓ Combination of three powerful forces



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European perspective:

- United approach to standards
- Some countries have stronger EV heritage
- Focus differs depending on country, eg CO₂ in UK





European perspective:

- Key document:
“The European Strategy for Clean and Energy Efficient Vehicles”
- Published by the European Commission
- A technology neutral approach, covering all vehicles
- ...But specific measures for EVs



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SMMT EV Group:



- Quarterly meetings: information and networking
- Broad range of complementary companies



Who's
next?





EV Group Priorities:

- 1. Government** EV incentives
- 2. Technical** Regulation and charger report
High Voltage Training Project
- 3. Infrastructure** PiP
- 4. Investment** Private equity
- 5. Consumer/ media perception** Electric car guide
- 6. Commercial Facilitator** Central EV hub

Conclusion:



- ✓ ICEs and a portfolio of technologies
- ✓ Unprecedented conditions for EVs
- ✓ SMMT support for low carbon vehicles
- ✓ Partnerships will be key success factor –
let's work together
- ❖ **Thank you for listening**





Any questions?

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